

DISTRICT 6

2002-2003 ANNUAL PRO BONO REPORT AND PLAN

This Annual Pro Bono Report and Plan is made pursuant to Rule 6.5 of the Indiana Rules of Professional Conduct. The goals of this plan are as follows:

- (1) To enable Indiana attorneys to discharge their professional responsibilities to provide civil legal pro bono services;**
- (2) To improve the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations throughout the state of Indiana;**
- (3) To ensure statewide access to high quality and timely pro bono civil legal services for persons of limited means by (i) fostering the development of new civil legal pro bono programs where needed and (ii) supporting and improving the quality of existing civil legal pro bono programs;**
- (4) To foster the growth of a public service culture within the Indiana Bar which values civil legal pro bono publico service;**
- (5) To promote the ongoing development of financial and other resources for civil legal pro bono organizations in Indiana;**

Hallmarks of an effective civil legal pro bono program

Ultimately, the measure of success for a civil legal services program, whether a staffed or volunteer attorney program, is the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs. The following hallmarks are characteristics, which enhance a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

- 1. Ownership by the local bar association. The association believes the program is necessary and beneficial. The bar association makes a dual commitment: to management of the program and to participation in the program.**
- 2. Centrality of client needs. The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available. The staff and volunteers are respectful of clients and sensitive to their needs.**
- 3. Program priorities. The program engages in a priority setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal services and other programs serving low-income people to assist in this process.**
- 4. Direct representation component. The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.**
- 5. Coordination with state and local civil legal service programs and bar associations. The programs work cooperatively with the local funded civil legal services programs. The partnerships between the civil legal services programs and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.**
- 6. Accountability. The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s) and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.**
- 7. Continuity. The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines which enable the program to survive a change in staff.**

8. Cost-effectiveness. The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

9. Minimization of barriers. The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

10. Understanding of ethical considerations. The program operates in a way, which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided.

11. ABA Standards. The program should be designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

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A. Abstract-

Please summarize the current status of your Committee's planning process. Your summary should include the District Committee's mission statement, a history of the organization, a description of the current legal services delivery system, as well as identification, categorization and prioritization of the legal problems experiences by indigent individuals within the counties of your District. Please include additional information you deem to be relevant to a complete description of the current status of your Committee.

Judge Jack L. Brinkman was named the Supreme Court Designee for the Sixth District Pro Bono Committee. Judge Brinkman attended the Pro Bono conference held in late August 1999 which explained the background, structure and mission of the new pro bono initiative for the State of Indiana. Immediately thereafter Judge Brinkman set about the task of forming the Sixth District Pro Bono Committee.

Having conferred with the Circuit Court Judge in each county of the Sixth District, Judge Brinkman was able to obtain a member of each county's bar association to sit on the committee. Also, as suggested in Rule 6.5, the legal assistance provider was named to the committee together with one community at-large representative. In May of 2000, an additional community at-large representative who has been a service recipient has been added to the committee. Also, in June 2000, the Henry County representative resigned from the committee due to time constraints and a new committee member was added.

An organizational meeting was conducted in Muncie, Indiana, in September 1999 during which members were introduced to one another and the task at hand was explained. With the November 1, 1999 report due date near at hand, the committee set its first working meeting for October 12, 1999. Ninety percent attendance was achieved at the October meeting and each representative submitted a report regarding legal services in their respective areas. Said information was compiled by Supreme Court Designee, Judge Jack L. Brinkman, and is included as our initial report. It was agreed by the committee that work on the 2000 Annual Pro Bono Report and Plan would commence in early January of theyear 2000. The committee has been meeting monthly and a Mission Statement has been developed and the governance standards for the committee have been incorporated in the 2000 Report and Plan. A description of current legal services for District 6 is included in detail under subsection C.

Indiana Legal Services Inc., through its Anderson Office, provides services to all six counties in District 6 but is clearly understaffed and underfunded to meet the needs of the indigent residents. Some bar association plans still exist while others have come and gone based upon the particular leadership of the county bar at any point in time.

Specific individual programs exist in Madison and Delaware County as described in the Plan. Grant County has submitted an attorney by attorney report of pro bono services. The small counties of District 6 reported that they operated on an informal, as needed,

A. Abstract-

volunteer basis with Blackford County expressing a concern about “forced” programs and Jay County has yet to report to the committee.

When the committee began its work again in January 2000, the areas of focus included defining in clear terms what services qualify as pro bono and a plan for increased participation in meeting the ethical obligation of each attorney and judge in the Sixth District and coordinating a system of delivery of pro bono services in an efficient and effective manner. Each area has been addressed by a plan primarily focused on obtaining the services of a Plan Administrator and procuring funding for specialized legal services and increasing awareness and participation by all judges and full-time prosecuting attorneys in the Sixth District. Future issues to be addressed by the committee for the remainder of the year 2000 include efforts to increase participation by financial institutions in the District in participating in the IOLTA program as well as increased attorney participation. Also the committee will continue to focus on the specific duties that the Plan Administrator will assume in carrying out the District’s plan and the committee’s specific role in evaluating that role.

The committee began work regarding the 2000 Plan by first revising the budget to conform with the allocation of funds made available through the Indiana Bar Foundation. Next a Memorandum of Understanding was drafted and executed by the Sixth District Committee Chair and Norman Metzger, Executive Director of Indiana Legal Services, Inc., designating the latter as the funding agent for the District. In February 2001, several committee members attended the 2nd annual Access to Justice conference in Indianapolis. Then in mid-March 2001, the District received the grant monies totaling \$19,651.00 from the Indiana Bar Foundation. During its regularly scheduled meeting of April 2001, the committee was pleased to have Kelly Kann Davidson visit and provide the committee with valuable information and insight as to our Rule 6.5 initiative. The Sixth District is currently considering forming a not-for-profit corporate entity to enhance future fund raising efforts. Also the District is setting about the task of employing a Plan Administrator as per our 2000 Plan. Since our 2000 Plan has yet to be implemented it is the committee’s belief that the 2001 Plan should replicate the 2000 Plan with a modestly modified budget to ensure continuity of service. In the event unexpected problems or additional needs would occur following the employment of a Plan Administrator, the committee would immediately seek to amend its Plan with full disclosure and approval of the Commission and Bar Foundation.

During the fall of 2001, the committee filed the necessary paperwork with the Indiana Secretary of State to form a not-for-profit corporation. As a result, the District 6 committee now operates through the District 6 Access to Justice, Inc. and we have made application to the Internal Revenue Service for recognition of exemption under section 501(c)(3). Such status is expected to be approved any day now which should greatly assist the District in future fund raising activities and efforts.

A. Abstract-

The committee has still not been successful in employing a Plan Administrator as no potential applicant or interviewee has worked out to date. The committee is now taking steps to step up the effort of hiring a Plan Administrator at the earliest possible time as this is felt to be an intrical part of the implementation of the District's plan. The committee hopes to have a Plan Administrator in place within 30 to 60 days.

As funds remain available through prior appropriations, the committee feels the 2002 Plan should compliment and not replicate the 2001 Plan and should any financial adjustments be necessary the committee would immediately seek to amend its Plan with full disclosure and approval of the Commission and Bar Foundation.

The committee also anticipates some membership changes as some current members have experienced schedule limitations which have led to their request for replacement. The committee plans to address this issue forthwith.

B. DATA

1. In the following space, please list the following information about the Committee members: name, organization affiliation (if any), address, phone, fax and E-mail address. Please include what category listed in rule 6.5 (f) (1) this person is representing. Please indicate if members represent more than one organization or category. Please include the judicial appointee and if applicable the District plan administrator at the top of this page.

Name	Judge Jack L. Brinkman
Organization	Madison Superior Court, Division 2
Address	16 East 9th Street, Box 25
City, State, zip	Anderson, Indiana 46016
Phone	(765) 641-9627
Fax	(765) 608-9711
Email	jbrinkman@madisoncty.com
6.5 (f)(1) category	Supreme Court Designee

J. Nicholas Barry
211 North High Street
PO Box 150
Hartford City, Indiana 47348-0150
(765) 348-1142
(765) 348-1418
Blackford County Representative

Rebecca Bruce
106 East Washington Street
Muncie, Indiana 47305
(765) 286-1776
(765) 286-5711
bruces@iquest.net
Delaware County Representative

Warren Haas
514 South Washington Street
Marion, Indiana 46953
(765) 662-7777
(765) 662-7796
haas@nxco.com
Grant County Representative

Mary G. Willis
Probate Commissioner
Henry Circuit Court
101 South Main Street
New Castle, Indiana 47362
(765) 529-1403
(765) 521-7046
Henry County Representative

Max C. Ludy, Jr.
123 North Meridian Street
Portland, Indiana 47371
(219) 726-9326
Jay County Representative

D. Eric Hall
One Citizens Plaza, Suite 200
800 Main Street
Anderson, Indiana 46016
(765) 644-2891
(765) 644-2894
hallde@iquest.net
Madison County Representative

B. DATA

1. In the following space, please list the following information about the Committee members: name, organization affiliation (if any), address, phone, fax and E-mail address. Please include what category listed in rule 6.5 (f) (1) this person is representing. Please indicate if members represent more than one organization or category. Please include the judicial appointee and if applicable the District plan administrator at the top of this page.

**Jason Welch
111 North Main Street
Winchester, Indiana 47394
(765) 584-4171
Randolph County Representative**

**Sean T. Newberry
Indiana Legal Services Inc.
1106 Meridian Plaza, Suite 215
Anderson, Indiana 46016
(765) 644-2816 Ext. 21
1-800-383-3541
(765) 642-2473
Legal Assistance Provider**

**Teresa Clemmons
A Better Way
PO Box 734
Muncie, Indiana 47308
(765) 747-9107
(765) 281-2740
tclemmons@netdirect.net
Community At-Large Representative**

**Gordon Stafford
655 North Elm
Muncie, Indiana 47305
(765) 284-8435
Community At-Large Representative**

2. **Governance - Briefly describe the organizational structure of your District, including replacement and succession of members, and terms of service.**

The District Judge designated by the Supreme Court shall serve as Chair of the Committee. Committee members shall serve a two year term with initial members terms to expire December 1, 2001 and every two years thereafter. Vacancies or successor terms of Committee members shall be filled or approved by the Committee Chair after consideration of input or recommendations from other Committee members, District Judges or District bar associations and pro bono service providers.

3. **History/Background - Please list all counties in the District, any pro bono organizing activity or efforts at coordination that existed prior to the formation of the Rule 6.5 Committee.**

SEE ANNUAL REPORT

4. **Plan Administrator - Rule 6.5(g)(2) requires each Committee to select and employ a plan administrator to provide the necessary coordination and administrative support for the District Pro Bono Committee. Please indicate the name of the person, the duties of the plan administrator, if that position is funded and if so, the source of those funds.**

BEING SOUGHT AS PER 2000-2001 PLAN

- 5. Monitoring Role - Briefly describe how the District Committee will evaluate and record the progress and success of the District Plan.**

(a) Quality of services provided: Through client questionnaires and service provider reports to be developed by the Plan Administrator.

(b) Quantity: All to be calculated and maintained by forms to be developed by the Plan Administrator and approved by the committee in cooperation with the Indiana Legal Services Inc.

(i) number of attorneys participating

TO BE DETERMINED

(ii) number of clients served

TO BE DETERMINED

(iii) number of hours

TO BE DETERMINED

(c) Costs associated with achieving goals: TO BE DETERMINED

- C. **Annual Report: Existing Services, Programs, and Funding Sources** - Please provide a detailed description of existing service providers, programs and funding sources currently in existence within your District. Please utilize the worksheets on the following pages for each entity and fill out the legal service provider annual progress report for each entity and the district annual progress report.

A. **Indiana Legal Services Inc.** In Madison County, the delivery of legal services to low income persons is primarily coordinated by Indiana Legal Services Inc. (Anderson office). Indiana Legal Services Inc. (ILS) serves low income persons in civil legal matters with incomes and resources below the federal poverty guidelines. Presently the office has one full time attorney, three paralegals, a nursing home ombudsman and two support staff. Another attorney is on medical leave. Approximately 30 percent of the office's caseload involves residents of Madison County. The priority areas for ILS Anderson office are public benefits, abusive divorces, housing matters, educational issues and consumer law. The requests for assistance far exceed the ability of staff to provide services. About 345 cases involving Madison County residents were opened by this office in 1998. Many others received advice only and a large percentage did not receive services because of staff and funding shortages. Funding sources for the ILS Anderson office are the Legal Services Corporation, United Way of Madison County and Lifestream (Area 6 Agency on Aging).

B. **Pro Bono Referral Program.** In those cases where ILS is unable to provide services to client-eligible persons, ILS has partnered with the Madison County Bar Association to establish a pro bono referral program. Approximately 50 of the 120 attorneys in Madison County participate in the referral program. About 30 of these lawyers actively take cases and typically each attorney handles one to two cases annually. ILS determines the financial eligibility of persons needing assistance and provides a short overview of the case to the participating private attorney. The private attorney provides services at no charge and communicates with ILS upon completion of the case. Approximately 50 cases were handled in 1998 by members of the Madison County Bar through this effort. ILS funds this project.

C. **Civil Public Defenders.** The Madison County Unified Courts employ two part-time civil public defenders. These attorneys provide representation in child support and visitation matters, primarily when indigent parents are facing the possibility of incarceration. They also provide representation to low income persons involved in mental health detention and commitment proceedings. Eligibility is determined by the presiding judge based upon the judge's determination on whether the person can afford representation. In 1998, the two part-time civil public defenders handled about 360 cases. They are paid through an appropriation from Madison County.

D. **Other Assistance.** In addition to the services described above, private attorneys in the county handle matters for individuals as well as not-for-profit organizations and churches on a pro bono basis. The extent of these voluntary services are not known. Most of the non-profit organizations serving the needs of low income persons attempt to include an attorney on their board of directors or otherwise establish a relationship with a member of the bar. Depending upon the situation, the attorney would be providing legal assistance at no charge or for a fee based upon the organization's ability to pay.

EXISTING SERVICE/PROGRAM

Service/Program Name: Indiana Legal Services Inc. (Anderson office)

Mailing Address: 1106 Meridian Plaza, Suite 215, Anderson, Indiana 46016

Phone: (765) 644-2816

Contact Person: Sean Newberry **Title:** Managing Attorney

Sponsoring Agency: Indiana Legal Services Inc.

Phone: (317) 631-9410

Agency Director: Norman Metzger

Service/Program Information:

Target Population: Low income persons needing civil legal assistance

Eligibility Requirements: Federal poverty guidelines

Service Area: Blackford, Delaware, Grant, Henry, Jay, Madison, Randolph and Tipton Counties

Type of Service/Program:

Estimate of Expense per Year: _____

Funding Source(s): Legal Services Corporation, United Way

Service /Program Description: Organization provides direct representation, advice and referral in civil legal matters. Organization also coordinates, in cooperation with the Madison County Bar Association, a pro bono referral program.

EXISTING SERVICE/PROGRAM

Service/Program Name: Madison County Pro Bono Program

Mailing Address: 1106 Meridian Plaza, Suite 215, Anderson, Indiana 46016

Phone: (765) 644-2816

Contact Person: Sean Newberry **Title:** Director

Sponsoring Agency: Indiana Legal Services Inc.

Phone: (765) 644-2816

Agency Director: Norman Metzger

Service/Program Information:

Target Population: Low income clients

Eligibility Requirements: Must meet ILS guidelines

Service Area: Madison County only

Type of Service/Program:

Estimate of Expense per Year: _____

Funding Source(s):

Service /Program Description: Indiana Legal Services screens applicants for income/asset information, then matches client with an attorney who will accept the type of case presented.

EXISTING SERVICE/PROGRAM

Service/Program Name: Grant County Pro Bono Program

Mailing Address: 1106 Meridian Plaza, Suite 215, Anderson, Indiana 46016

Phone: (765) 644-2816

Contact Person: Sean Newberry Title: Director

Sponsoring Agency: Indiana Legal Services Inc.

Phone: (765) 644-2816

Agency Director: Norman Metzger

Service/Program Information:

Target Population: Low income clients

Eligibility Requirements: Must meet ILS's income guidelines

Service Area: Grant County

Type of Service/Program:

Estimate of Expense per Year: _____

Funding Source(s):

Service /Program Description: Nascent program.

EXISTING SERVICE/PROGRAM

Service/Program Name: Christian Ministries of Delaware County

Mailing Address: 401 E. Main Street, Muncie, IN 47305

Phone: (765) 288-0601

Contact Person: Carol McConnell **Title:** Director

Sponsoring Agency:

Phone:

Agency Director:

Service/Program Information:

Target Population: Low income clients

Eligibility Requirements: Federal poverty guidelines

Service Area: Delaware

Type of Service/Program:

Estimate of Expense per Year: _____

Funding Source(s):

Service /Program Description: Delaware County attorneys provide free face to face consultations to low income Delaware County residents.

**Legal Service Provider
Annual Progress Report**

	Legal Service Provider Indiana Legal Services-Anderson
Screened Cases	1,084
Assigned Cases	122
Closed Cases	498
Declined Cases	458
Other Cases: (specify)	0
Total Cases per Provider	
Number of Volunteer Attorneys	0

List Number of Cases of Each Type	Legal Service Provide Indiana Legal Services-Anderson
Consumer/Finance	36
Education	0
Employment	0
Family	274
Juvenile	0
Health	158
Housing	37
Income Maintenance	64
Individual Rights	0
Other*	51
Total Number of Cases	620

*ILS – Anderson’s service area includes Tipton County, but the number of cases from Tipton County is small.

**Legal Service Provider
Annual Progress Report**

	Legal Service Provider Madison County Pro Bono
Screened Cases	6
Assigned Cases	6
Closed Cases	0
Declined Cases	0
Other Cases: (specify)	0
Total Cases per Provider	
Number of Volunteer Attorneys	42

List Number of Cases of Each Type	Legal Service Provide Madison County Pro Bono
Consumer/Finance	0
Education	0
Employment	0
Family	5
Juvenile	0
Health	0
Housing	0
Income Maintenance	0
Individual Rights	0
Other*	1
Total Number of Cases	6

**Legal Service Provider
Annual Progress Report**

	Legal Service Provider Grant County Pro Bono
Screened Cases	0
Assigned Cases	0
Closed Cases	0
Declined Cases	0
Other Cases: (specify)	0
Total Cases per Provider	
Number of Volunteer Attorneys	4

List Number of Cases of Each Type	Legal Service Provide Grant County Pro Bono
Consumer/Finance	0
Education	0
Employment	0
Family	0
Juvenile	0
Health	0
Housing	0
Income Maintenance	0
Individual Rights	0
Other*	0
Total Number of Cases	0

**Legal Service Provider
Annual Progress Report**

	Legal Service Provider Christian Ministries
Screened Cases	10
Assigned Cases	10
Closed Cases	0
Declined Cases	0
Other Cases: (specify)	0
Total Cases per Provider	
Number of Volunteer Attorneys	6

List Number of Cases of Each Type	Legal Service Provide Christian Ministries
Consumer/Finance	0
Education	0
Employment	0
Family	0
Juvenile	0
Health	0
Housing	0
Income Maintenance	0
Individual Rights	0
Other*	*
Total Number of Cases	10

*Face to face consultation with clients. No court representation.

District 6
Annual Progress Report

	District Totals
Screened Cases	1,100
Assigned Cases	138
Closed Cases	498
Declined Cases	458
Other Cases: (specify)	0
Total Cases per District	
Number of Volunteer Attorneys	52

List Number of Cases of Each Type	District Totals
Consumer/Finance	36
Education	0
Employment	0
Family	275
Juvenile	0
Health	158
Housing	37
Income Maintenance	64
Individual Rights	0
Other*	62
Total Number of Cases	636

D. 2002-2003 Annual Plan:

Problem Statements\ Recommendations - For each problem, use one complete worksheet with as many recommendations for solving that problem as necessary. Please number your problems according to priority.

- 1. Problem Identification- Problem statements identify all of the barriers faced by indigent individuals in their effort to resolve problems through the legal system.**
- 2. Supportive Data- Supportive Data (statistics, survey results, records, reports, etc.) should be organized to show how the barriers are preventing people from accessing justice.**
- 3. Recommended Actions to address barriers and problems - These recommendations are identified with one of the categories of opportunities for attorneys found in Rule 6.5 (i).**
- 4. Recommended Actions to support the participating attorneys. - These elements are identified in Rule 6.5(h).**
- 5. Expected Results - The expected result is a statement describing the expected benefit to be derived from the expenditure of human and financial resources.**
- 6. Benchmarks - These are the measurable goals for evaluating progress of proposed recommended actions.**
- 7. Costs associated with benchmarks - This is the proposed budget necessary for achieving the expected results.**

PROBLEM STATEMENTS/RECOMMENDATIONS WORKSHEET

Problem/Barrier # 1 :

In counties with bars of less than ten (10) lawyers and more demand for lawyers than supply, conflicts of interest will abound and needy applicants will have to be turned away.

What data supports your statement of the problem?

Anecdotal experience combined with the raw dearth of practicing lawyers in counties such as Jay, Blackford, and Randolph.

What activities will the attorneys in your District take to address this barrier or problem? For each checked activity, please provide a detailed description of your District's plan for implementing this activity.

- ☒ Representing persons of limited means through case referral
- ☒ Representing persons of limited means through direct contact with a lawyer when the lawyer establishes financial eligibility substantially similar to those used by legal assistance providers
- ☐ Representing community groups servicing persons of limited means through case referral
- ☒ Interviewing and determining eligibility of prospective pro bono clients
- ☐ Acting as co-counsel on cases or matters with civil legal assistance providers and other pro bono lawyers
- ☐ Providing consultation services to civil legal assistance providers for case reviews and evaluations
- ☐ Providing training to the staff of civil legal assistance providers and other volunteer pro bono attorneys;
- ☐ Making presentations to persons of limited means regarding their rights and obligations under the law
- ☐ Providing legal research
- ☐ Providing guardian ad litem services
- ☐ Serving as a mediator or arbitrator to the client-eligible party
- ☒ Other Proposed pro se kiosk and clinics so applicants can represent themselves in routine post-decree modification matters (custody, support, parenting time).

Description:

- A. **Recommended Action to address barrier:** Request attorneys on the pro bono roster to at least take one case in a sister county (e.g., a Muncie attorney filing a Randolph County divorce).
- B. **Recommended Action to support participating attorneys:** Pro Bono Coordinator, with support of ILS board representative, will give the volunteer attorney informal training on the local idiosyncracies of practice in the particular court.
- C. **Expected Result:** More assigned cases over a greater geographical area resulting in a final order or settlement.
- D. **Benchmarks:** To show a 25% improvement in coverage over the District 6 service area over the course of a year.
- E. **Costs associated with benchmarks:** None other than the Coordinator's salary; possible payment for mileage.

PROBLEM STATEMENTS/RECOMMENDATIONS WORKSHEET

Problem/Barrier # 2 :

The inability of an indigent abuse spouse to pay for publication costs if other means of service fail or are not possible under the circumstances.

What data supports your statement of the problem?

Anecdotal experience from representing indigent abused spouses in dissolution cases.

What activities will the attorneys in your District take to address this barrier or problem? For each checked activity, please provide a detailed description of your District's plan for implementing this activity.

- ☐ Representing persons of limited means through case referral
- ☐ Representing persons of limited means through direct contact with a lawyer when the lawyer establishes financial eligibility substantially similar to those used by legal assistance providers
- ☐ Representing community groups servicing persons of limited means through case referral
- ☐ Interviewing and determining eligibility of prospective pro bono clients
- ☐ Acting as co-counsel on cases or matters with civil legal assistance providers and other pro bono lawyers
- ☐ Providing consultation services to civil legal assistance providers for case reviews and evaluations
- ☐ Providing training to the staff of civil legal assistance providers and other volunteer pro bono attorneys;
- ☐ Making presentations to persons of limited means regarding their rights and obligations under the law
- ☐ Providing legal research
- ☐ Providing guardian ad litem services
- ☐ Serving as a mediator or arbitrator to the client-eligible party
- ☒ Other

Description:

- A. **Recommended Action to address barrier:** Request local newspapers to allow publication either gratis or at a reduced rate.
- B. **Recommended Action to support participating attorneys:** The Coordinator will help the attorney arrange for the advertisement.
- C. **Expected Result:** More assigned cases resulting in a final order or settlement.
- D. **Benchmarks:** No client abandoning a divorce because the client cannot afford a publication fee.
- E. **Costs associated with benchmarks:** None other than the Coordinator's salary.

Please describe the expected results and the measures, which you will utilize to determine the value to the indigent of the proposed activity.

Using the case management procedures already followed by ILS-Anderson, we will track the type, number, and ultimate outcome of cases referred to our Pro Bono attorneys. For our pro se initiative, we will start by taking counting the number of attendees at our pro se clinics and perhaps later we will be able to count the number of people using the Pro Se kiosks throughout our area by either hits on the associated web site or some other software solution that will allow us to count the number of users without revealing the identity of those users to preserve their anonymity and avoid any possible conflict of interest problems.

Please provide your timeline for implementing and evaluating the recommended activities.

Third Quarter 2002: Hire Pro Bono Coordinator. Begin district wide awareness campaign about the Pro Bono initiative and IOLTA accounts.

Fourth Quarter 2002: Continue to recruit attorneys through bar meetings, concentrating especially in Delaware and Grant Counties. Confer with local judges about pro se initiative in each county.

First Quarter 2003: Continue recruitment efforts; organize Continuing Legal Education Program for continuing Pro Bono attorneys and newly recruited attorneys. Begin to install pro se kiosks in each county at either the courthouse or main library.

Second Quarter 2003: Pro Bono Coordinator will have talked to at least one judge in each county regarding the Pro Bono program and pro se initiative. District wide survey and count of volunteering attorneys. Wind up installation of all pro se kiosks in all counties in the district. Submit next year's report and plan.

BUDGET FORM

COST CATEGORY	IOLTA \$	OTHER \$	DONATED	TOTAL
A. Personnel Costs				
1. Lawyers				
2. Paralegals	\$21,000			\$21,000
3. Others				
4. Salary Subtotal	\$21,000			\$21,000
5. Employee Benefits	15,000			15,000
6. Total Personnel Costs	\$36,000			\$36,000
B. Non Personnel				
1. Space	in kind			in kind
2. Equipment Rental				
3. Office Supplies	1,500			1,500
4. Telephone	1,500			1,500
5. Travel	2,500			2,500
6. Training	500			500
7. Library				
8. Insurance				
9. Dues and Fees				
10. Audit				
11. Litigation				
12. Property Acquisition	10,000			10,000
13. Purchase Payments				
14. Contact Services to Clients				
15. Contract Services to Program				

16. Other				
17. Total Non Personnel Costs	16,000			16,000
C. Total Expenditures	\$52,000			\$52,000
18. Project A Disbursements				
19. Project B Disbursements				
20. Project C Disbursements				
21. Total Program Disbursements				
22. Litigation Fund*				

*Reserves in this category are not required to be resubmitted to the IBF if not spent during the allocation calendar year.

List of Appendices

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SUBMISSION PROCEDURES

Ten copies of the completed annual report and plan shall be submitted to: Jennifer Theresa Cloyd Konomos, Indiana Pro Bono Commission, 230 East Ohio Street, Fourth Floor Indianapolis, Indiana 46204. Plans should be submitted no later than 5:00 p.m. on July 1, 2002.

CHECKLIST FOR ANNUAL REPORT AND PLAN:

- _____ Pro Bono Annual Report and Plan for current year pp. 1-20 (10 copies)
- _____ Proposed budget pp 18-19 (10 copies)
- _____ Legal Service Provider Annual Progress Report p.11 (10 copies)
- _____ District Annual Progress Report p.12 (10 copies)
- _____ Enclosures (10 copies)
- _____ Disk in Word or Excel of all submitted materials or submission via e-mail at
probono@inbar.org

ANNUAL TIME TABLE FOR SUBMISSION OF FORMS AND CHECKS:

January 1:	Checks distributed
January 31:	IBF final grant progress report for previous year due
June 1:	IBF mid-year grant progress report due
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
December 1:	IBF grant agreement due and revised budget due (as needed)

Additional information concerning these instructions or the submission of a plan may be obtained from Jennifer Theresa Cloyd Konomos, Indiana Pro Bono Commission, 230 East Ohio Street, Fourth Floor Indianapolis, Indiana 46204 or by calling at 317-639-5465 or by e-mail at probono@inbar.org.